Chapter
8

# Inventory Module

The Inventory module is used to record and track inventory and storeroom information. This Chapter describes how to use the Web Work, Inventory module.

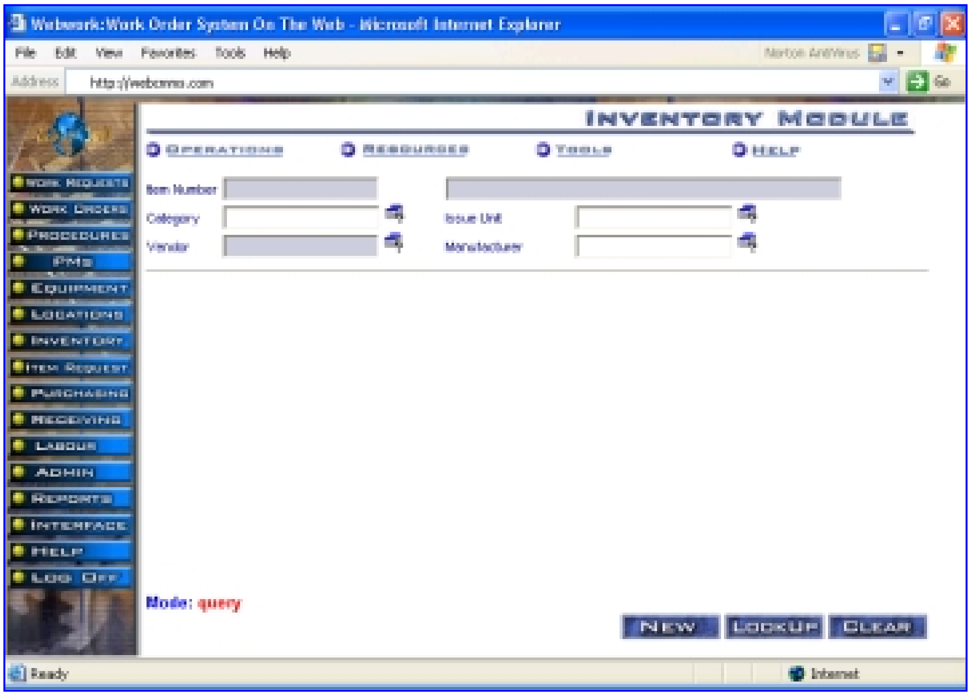
## Table of Contents

## 1.1 Overview of the Inventory Module

The Inventory module is where inventory items are entered into the Web Work system, where storerooms are setup and where inventory is assigned to storerooms.

Click on the INVENTORY button  on the left hand side of the screen to access the Inventory module.

When you enter the Inventory module you will be in Query mode as shown in the screen pictured below:



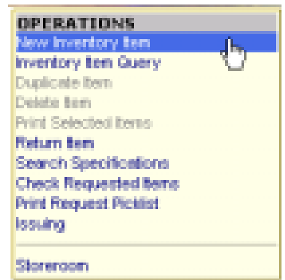

The OPERATIONS OPERATIONS, RESOURCES RESOURCES, TOOLS TOOLS and HELP HELP drop down menus contain the various features available in the Inventory module.

Web Work includes "help files" for all field names. To access these help files, click on the field name. A popup window will open displaying help for the field selected.

## 2.1 Adding Items to Inventory

The inventory module is used to record and track inventory. Create an inventory record for all stock items used by your organization.

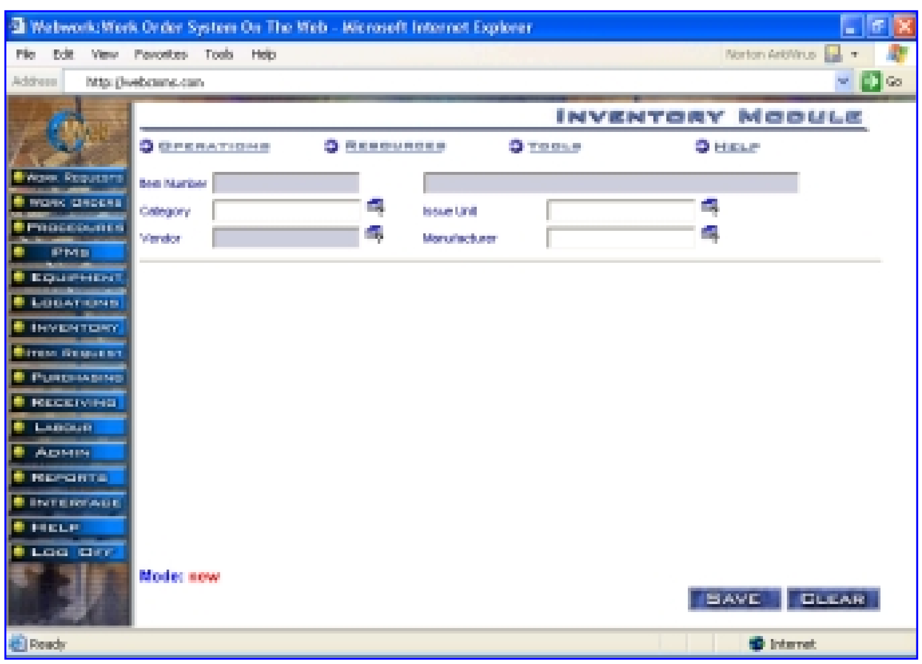
To add a new inventory item;




- Click on the INVENTORY button  to access the Inventory module.
- Click on the  menu to display the drop down menu.
- Select New Inventory Item from the drop down menu.

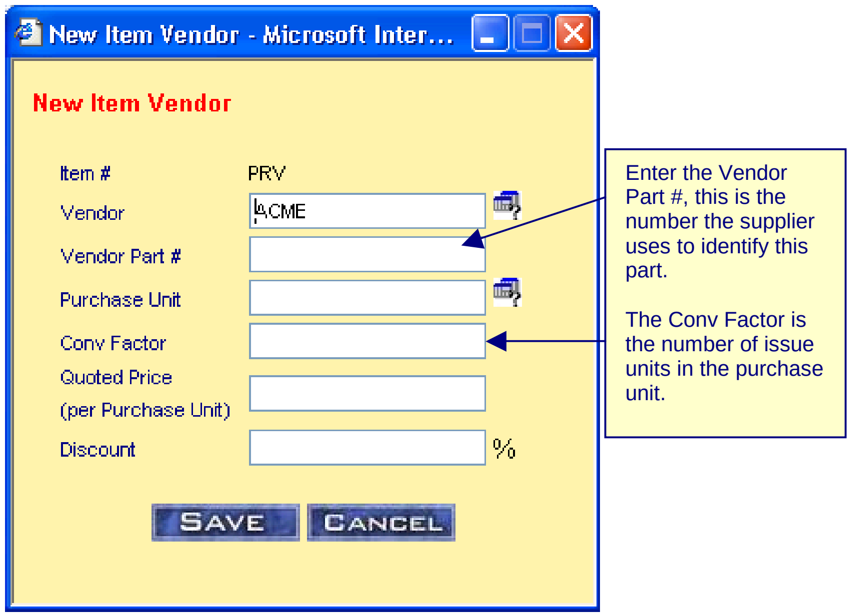
When you are in Query mode and want to create a new inventory record, you can click on the OPERATIONS menu and select New Inventory Item from the drop down menu or you can click on the NEW button at the bottom right hand side of the screen to open the Inventory module in New Mode.

A screen similar to the one pictured below will open:




- Enter information into the fields displayed on the screen.

- Note: *Item #, Description, Issue Unit and Vendor* are the only <u>required</u> fields, all others are optional fields.
- When you enter a code into the vendor field the New Item Vendor screen will open as pictured below:




- The Item # and Vendor fields are populated by the Web Work system.
- Enter the Vendor Part Number.

It is recommended that Vendor Part #'s are not used as Inventory Item Numbers in the Web Work system. This will ensure you avoid duplication of items with the same part number and will also avoid the need to change your inventory item # when a vendor changes their numbering system.

- Enter the Purchase Unit or click on the QUERY button to select the purchase unit from the Web Work database. IE: box, dozen, ton, etc.
- Enter the Conv Factor. The conversion factor is the number of issue units of an inventory item that is equivalent to one purchase unit of the same item.
- Enter the Quoted Price per purchase unit.
- Enter any applicable discount.
- Click on the SAVE button SAVE to save the vendor information and return to the main screen of the inventory record.

Additional vendors can be setup for an inventory item. To add an additional vendor for an inventory item see Adding Additional Vendors for an Inventory Item further on in this manual.

- Click on the SAVE button to save the Inventory record.

  You will then be in edit mode, you can edit the record, click on the NEW button to add another inventory item or continue working in the module of your choice.

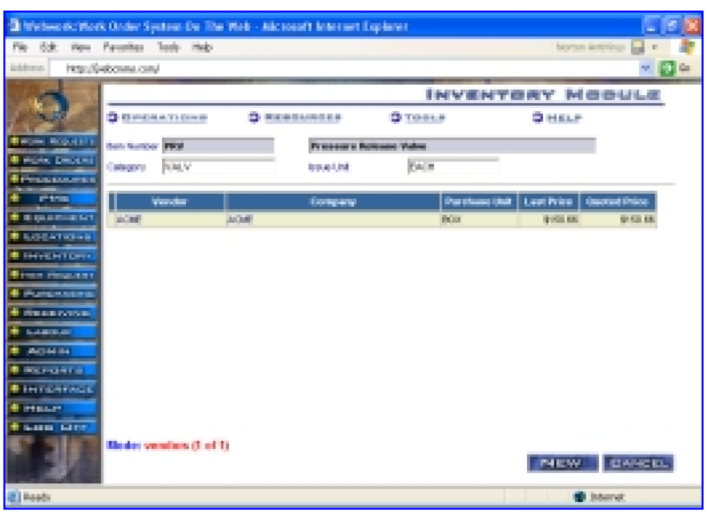
## 3.1 Adding Additional Vendors for an Inventory Item

Your organization may have a preferred vendor for an inventory item and also a number of additional vendors for the item, in case the preferred vendor does not have the stock you require.

To add an additional vendor for an inventory item:

- Click on the INVENTORY button to access the Inventory module.
- Click on the OPERATIONS menu to display the drop down menu.
- Locate and retrieve the applicable inventory record by performing an inventory query. See Inventory Queries for more information on performing inventory queries.
- Click on the RESOURCES menu and select Vendors from the drop down menu.


- The inventory record will open in Vendors mode as pictured below:




- Click on the NEW button to open the New Item Vendor window.
- Enter information about the vendor.
- Click on the SAVE button to save the vendor information.

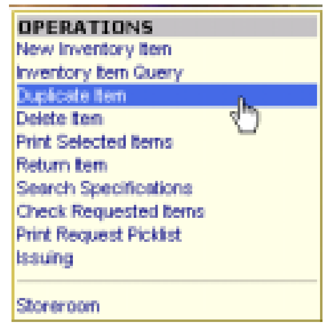
The additional vendor will be displayed in the table on the lower half of the applicable inventory record.

## 4.1 Duplicating Inventory Items

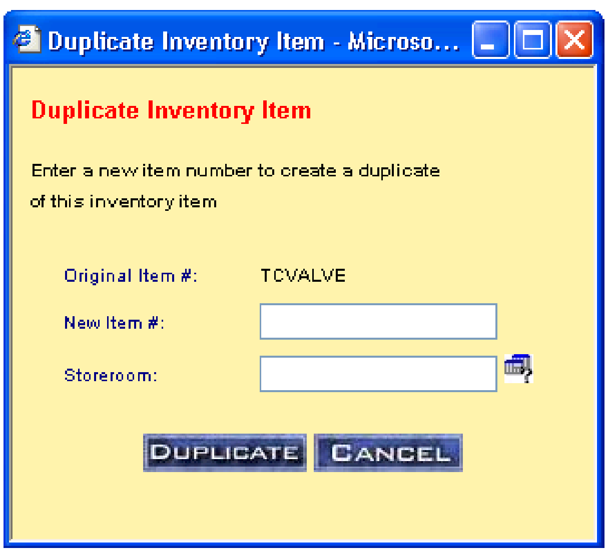
Instead of having to retype similar information for similar inventory items, you can create a duplicate inventory records and edit the information for the new record as required.

To duplicate an inventory item:

- Click on the INVENTORY button INVENTORY to access the Inventory module.
- Locate and retrieve the applicable inventory record by performing an inventory query. See Inventory Queries for more information on performing inventory queries.
- Click on the OPERATIONS menu to display the drop down menu.
- Select Duplicate Item from the drop down menu.




The Duplicate Inventory Item screen will open as pictured below:




- Enter a New Item #.
- Enter a Storeroom or click on the QUERY button to select a Storeroom from the Web Work database. Note: the storeroom can be setup at a later date.
- Click on the DUPLICATE button DUPLICATE to duplicate the inventory item and open the new record in edit mode. Edit information as required.
- Click on the SAVE button SAVE to save the Inventory record.

## 5.1 Inventory Specifications

Additional details about an inventory item can be added using the Specifications feature. You can later do searches on location specifications to find locations with similar attributes.

Specifications are details pertaining to an inventory item.

### 5.1.1. Adding Item Specifications

To add specifications for an inventory item:

- Click on the INVENTORY module 

button to open the Inventory module.

- You can either create and save a new inventory record and then add specifications to it or you can do an inventory query to locate the applicable inventory record and then add specifications to it. See Inventory queries for more information on inventory queries.

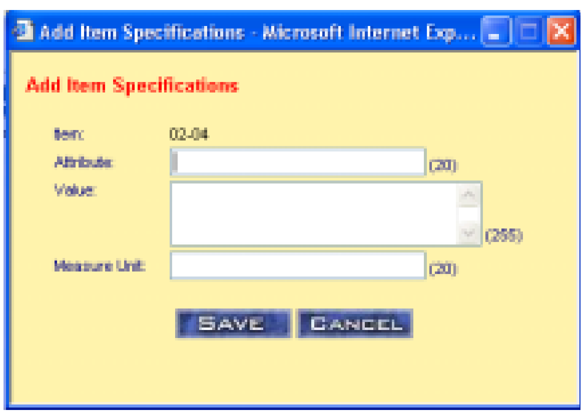

- Regardless of which method you choose, an inventory record must be open before you can add specifications to it.

- Click on the 

menu at the top of the screen and select Specifications from the drop down menu.

- Click on the NEW Button 

at the bottom of the screen to open the Add Item Specifications screen as pictured below:




- The Item field will fill in automatically with the Item ID. This is a read only field and cannot be edited.

- Add an attribute.

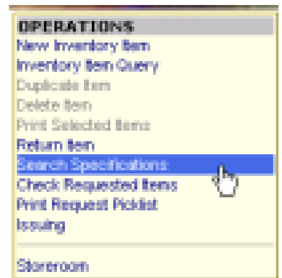
- Add a value.

- Add a measure unit.

- Click on the SAVE button to save the Item Specifications and return to the item specification screen.

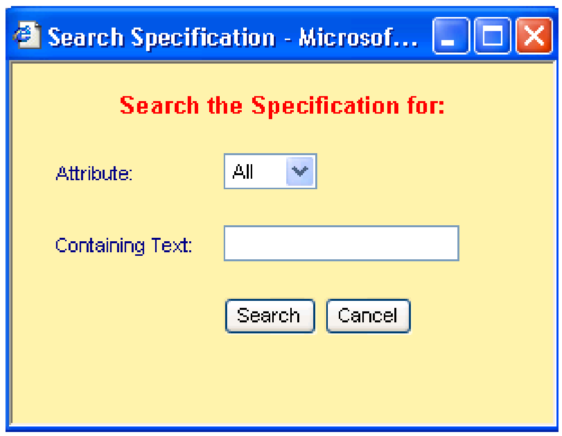
### 5.1.2. Searching Specifications

The search specifications feature in Web Work permits you to query the Web Work database to locate inventory records with similar specifications.




- Click on the INVENTORY button to access the Inventory module.
- Click on the OPERATIONS menu to display the drop down menu.
- Select Search Specifications from the drop down menu.

  The Search Specification screen as pictured below will open:




- Select the Attribute by clicking on the down arrow and selecting the applicable attribute from the list shown.
- Enter the selection criteria into the Contains Text field.
- Click on the SEARCH button. A table showing all inventory records containing the selected specification will be displayed.
- Click on the check box beside the records you wish to retrieve or on Select All to retrieve all the records containing the specified criteria.
- Click on the RETRIEVE button to retrieve the records.

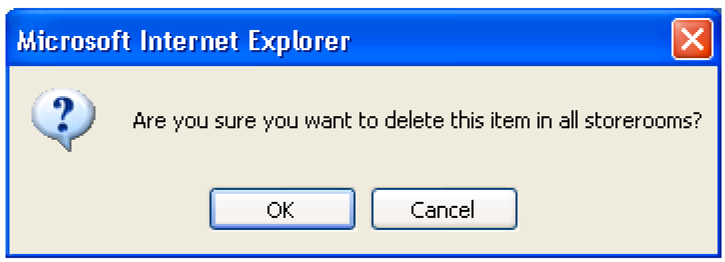
  The inventory records you have selected will appear on the screen. If you selected multiple inventory records, when you retrieve them an arrow Next will appear on the bottom left hand side of the screen. Click on this arrow to move from one inventory record to the next.

## 6.1 Deleting Inventory Items

Caution should be taken when deleting any records from the Web Work database. However, there may be times when this necessary.

To delete an Inventory item:


- Click on the INVENTORY button INVENTORY to access the Inventory module.
- Locate and retrieve the inventory item you wish to delete.
- Click on the OPERATIONS menu to display the drop down menu.
- Select Delete Item from the drop down menu.
- A message box confirming you want to delete the item from all storerooms will be displayed.




- Click on the OK button to confirm you want to delete the inventory item or on the CANCEL button to cancel this operation and return to the inventory record.

## 7.1 Performing Inventory Queries

Find the Inventory records you are looking for quickly and easily using Web Work's query by example feature. For more information on Query by Example see the System Overview section of this manual.

To perform an Inventory item Query:

- Click on the INVENTORY button INVENTORY to access the Inventory module.
- When you enter the Inventory module you will be in query mode. If you have been working in a different mode, click on the OPERATIONS menu at the top of the Inventory Screen to display the drop down menu.
- Select Inventory Query from the menu.
- The mode you are in is displayed at the bottom left hand side of the screen. (ie: query mode)
- Enter selection criteria into any of the fields.

- Click on the LOOKUP button to display a list of the records, matching the specified criteria.

After you enter the criteria into the selected fields, you can hit the ENTER button on your keyboard to open all records which match the specified criteria.

- To open any of these Inventory records click the selection box on the right hand side of the applicable Inventory records in the table, and then click on the RETRIEVE button at the bottom of the screen.

Click on the column headers to sort the records in either ascending or descending order.

- The Inventory record will appear on the screen. If you selected multiple Inventory records, when you retrieve them an arrow will appear on the bottom left hand side of the screen.

  Click on this arrow Next to move from one inventory record to the next.

Comparison operators such as: <, >, null, not null and % - wild card can be used to further define a query. See System Overview – Query By Example for more information.

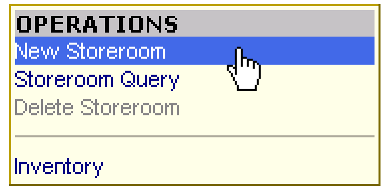
## 8.1 Creating Storerooms

The Storeroom module is a sub module of the Inventory module. Access the Storeroom module by clicking on the OPERATIONS menu and selecting Storeroom from the drop down menu.

To create a storeroom:

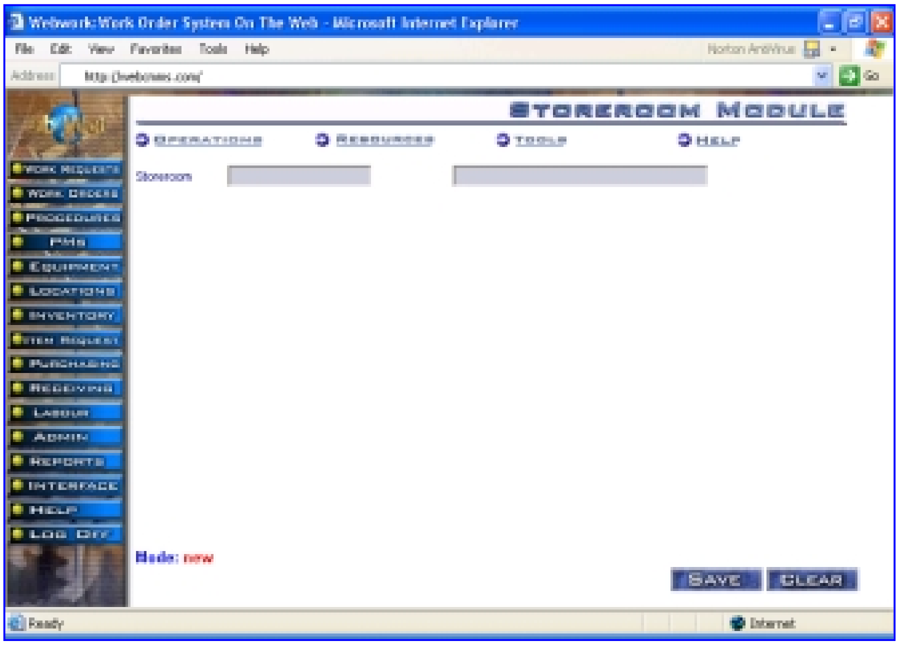
- Click on the INVENTORY button to access the Inventory module.
- Click on the OPERATIONS menu at the top of the Inventory screen to display the drop down menu.
- Select Storeroom from the drop down menu.


When the Storeroom application is opened, the menu selections under OPERATIONS and RESOURCES change. To return to Inventory click on the OPERATIONS menu and select Inventory from the drop down menu.




- The Storeroom module will open in query mode.
- Click on the OPERATIONS menu at the top of the screen and select New Storeroom or click on the NEW button NEW.

The Storeroom module will open in New mode as pictured below:



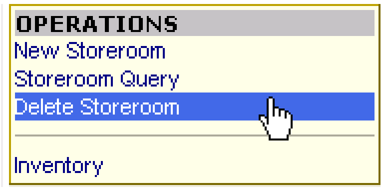

- Enter a code and a description for the new storeroom into the applicable fields.
- Click on the SAVE button SAVE to save the new storeroom.

You can now add inventory items to the new storeroom. Seeing adding inventory to storerooms for more information on this feature.

## 9.1 Deleting Storerooms

To delete a storeroom:

- Click on the INVENTORY button INVENTORY to access the Inventory module.
- Click on the OPERATIONS menu at the top of the Inventory screen to display the drop down menu.
- Select Storeroom from the drop down menu.
- The Storeroom module will open in query mode.
- Perform a storeroom query to locate and open the applicable storeroom.




- Click on the  menu screen and Delete Storeroom from the drop down menu.
- A message box will open confirming you want to delete the storeroom and all items in the storeroom.


- Click on the OK button to delete the storeroom or the CANCEL button to cancel this action and return to the storeroom record.

## 10.1 Adding Inventory to Storerooms

Inventory can be added to a storeroom from either the Inventory or the Storeroom module.

### 10.1.1. Adding Inventory to Storerooms in the Storeroom Module

To add an inventory item to a storeroom:


- Click on the INVENTORY button  to access the Inventory module.
- Click on the  menu at the top of the Inventory Screen to display the drop down menu.
- Select Storeroom from the drop down menu.

When the Storeroom application is opened, the menu selections under Operations and Resources change. To return to Inventory click on the *OPERATIONS* button and select Inventory from the drop down menu.

- The Storeroom module will open.
- Perform a storeroom query to locate and open the applicable storeroom.


- Click on the RESOURCES menu at the top of the screen to display the drop down menu.
- Select Add Inventory Item from the drop down menu.
- The Storeroom window will open.
- The Storeroom field is populated by the Web Work system.
- Enter an inventory item or click on the QUERY button to select an item from the Web Work database. If a manufacturer was entered when you created the inventory item, this information will be populated on the storeroom screen.
- Enter an Aisle, Row and Bin number if applicable.

Tero Consulting provides services to assist with the setup and labeling of storerooms. Contact our head office for more information on this service.

- Enter a Vendor or click on the QUERY button to select a vendor from the Web Work database. When you select a vendor the Vendor Part #, Last Price, Average Price, Quoted Price, Purchase Unit, Conversion and Issue Unit fields will be populated with the information entered when the inventory record was created.
- Enter the current Stock Level.
- Select the reorder method: EOQ or Min/Max
- Click on the SAVE button SAVE to save the item to this Storeroom and return to the Storeroom record.

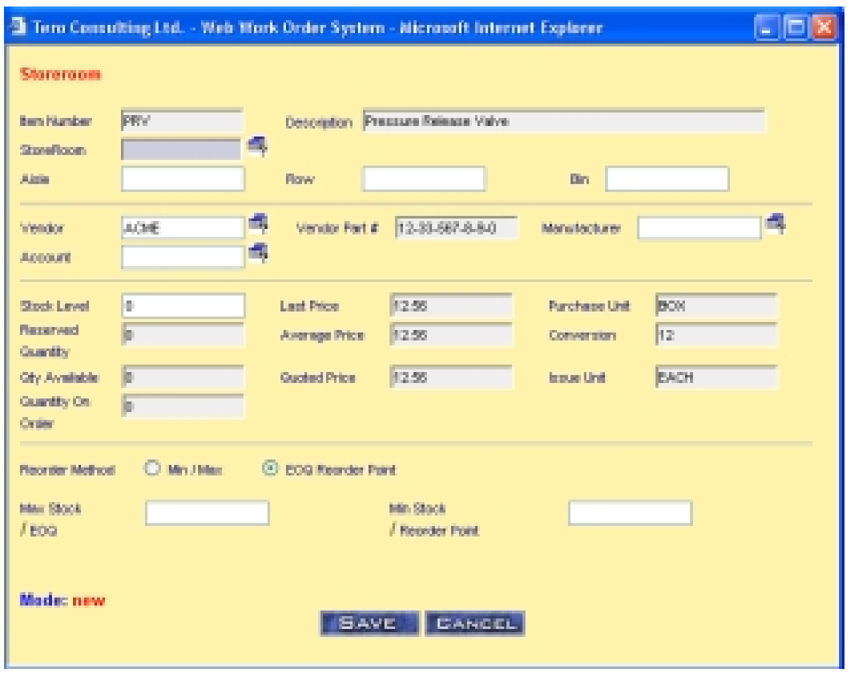
### 10.1.2. <u>Adding Inventory to Storerooms in the Inventory Module</u>

To add an inventory item to a storeroom:

- Click on the INVENTORY button INVENTORY to access the Inventory module.
- When you enter the Inventory module you will be in query mode. If you have been working in a different mode, click on the OPERATIONS menu at the top of the Inventory Screen to display the drop down menu.
- Open an Inventory item. (see performing Inventory Queries for information how to open inventory items already entered into the Web Work Order System)
- Click on the RESOURCES menu at the top of the screen to display the drop down menu.

- Select Add to Storeroom from the drop down menu.


The Storeroom window will open as pictured below:




- The Item Number, Description, Vendor, Vendor Part#, Last Price, Average Price, Quoted Price, Purchase Unit, Conversion and Issue Unit are populated based on the information you entered on the Inventory record.

- Enter a storeroom or click on the QUERY button to select a storeroom from the Web Work database.

- Enter an Aisle, Row and Bin number if applicable.

Tero Consulting provides services to assist with the setup and labeling of storerooms. Contact our head office for more information on this service.

- Enter a Manufacturer or click on the QUERY button to select a manufacturer from the Web Work database. If a manufacturer was entered when the inventory record was created this field will be populated with this information.

- Enter an Account or click on the QUERY button to select an account from the Web Work database.

- Enter the current Stock Level.
- Select the reorder method:  EOQ or Min/Max
- Click on the SAVE button SAVE to save the item to this Storeroom and return to the Inventory screen.

Items can be added to more than one storeroom by following the instructions above and changing the storeroom information.

## 11.1 Editing Storeroom Information

Storeroom information can be edited in the Inventory or the Storeroom module.

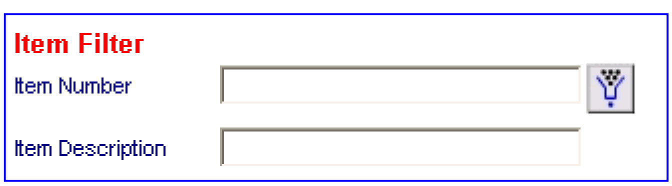
### 11.1.1. Editing Storeroom information in the Storeroom module

To edit storeroom information:

- Click on the INVENTORY button INVENTORY to access the Inventory module.
- Click on the OPERATIONS menu at the top of the Inventory Screen to display the drop down menu.
- Select Storeroom from the drop down menu.


When the Storeroom application is opened, the menu selections under Operations and Resources change.  To return to Inventory click on the *OPERATIONS* button and select Inventory from the drop down menu.

- The Storeroom module will open.
- Perform a storeroom query to locate and open the applicable storeroom.
- Use the item filter to display the applicable inventory items in this storeroom.




- Click on the item number or description to open the storeroom window.

- Edit information as required.
- Click on the SAVE button to save the updated information.

While in the Storeroom application, click on the OPERATIONS menu and select Inventory from the drop down menu to return to the main section of the Inventory module.

### 11.1.2. Editing Storeroom information in the Inventory module

- Click on the INVENTORY button to access the Inventory module.
- When you enter the Inventory module you will be in query mode. If you have been working in a different mode, click on the OPERATIONS menu at the top of the Inventory Screen to display the drop down menu.
- Open an Inventory item. (see performing Inventory Queries for information how to open inventory items already entered into the Web Work Order System)
- A table listing the storerooms where the item is located will be displayed.
- Click on the applicable storeroom in the table.
- Edit Information as required.
- Click on the SAVE button to save the updated information.

## 12.1 Performing Storeroom Queries

- Click on the INVENTORY button to access the Inventory module.
- Click on the OPERATIONS menu at the top of the Inventory Screen to display the drop down menu.
- Select Storeroom from the drop down menu.
- The mode you are in is displayed at the bottom left hand side of the screen. (ie: query mode) The Storeroom module opens in query mode by default. If you have been working in the Storeroom module and are in a different mode, click on the OPERATIONS menu and select Storeroom Query from the drop down menu.


- Enter selection criteria into the Storeroom or Description field and click on the LOOKUP button to display a list of storerooms matching the criteria you selected.
- If you want to view all storerooms, click on the LOOKUP button without entering any information into the Storeroom or Description field.

- If you know the code for the storeroom, enter it into the Storeroom field and press the enter key on your computer keyboard. This will open the storeroom in edit mode.

- To open any of the Storeroom records displayed in the table click the selection box on the right hand side of the applicable record (s) in the table, and then click on the *RETRIEVE* button 

at the bottom of the screen. The Storeroom record will appear on the screen. If you selected multiple records, when you retrieve them an arrow will appear on the bottom left hand side of the screen. Click on this arrow 

to move from one record to the next.

## 13.1 Returning Inventory Items

If items have been expensed against a work order, item request or account and is unused and needs to be returned, the Return Item Feature allows you to perform this task.

To return an item:


- Click on the INVENTORY button 

to access the Inventory module.

- Click on the 

menu at the top of the Inventory Screen to display the drop down menu.

- Select Return Item from the drop down menu.

  The Return Item screen will open as pictured below:

- Click on the down arrow to select Work Order, Item Request or Account.
- Enter a work order, item request or account number or click on the QUERY button to select a work order, item request or account number from the Web Work database.
- Click on the FILTER button to display a table showing the items which match the criteria you entered.
- Click on the checkboxes beside the item you wish to return and enter the quantity into the Return Qty field.

| | Issue Date | Storeroom | Item # | Description | Quantity | Return Qty |
|---|---|---|---|---|---|---|
| ☐ | 4/23/2002 | Main | PRV | Pressure Release Valve | 1 | |

- Click on the RETURN button to return the items you selected.
- A list of items returned will be displayed.

Returned Items

| Storeroom | Item # | Quantity |
|---|---|---|
| Main | PRV | 1 |

To continue returning items enter new selection criteria or click on the CLOSE button CLOSE to close the Return Items window.

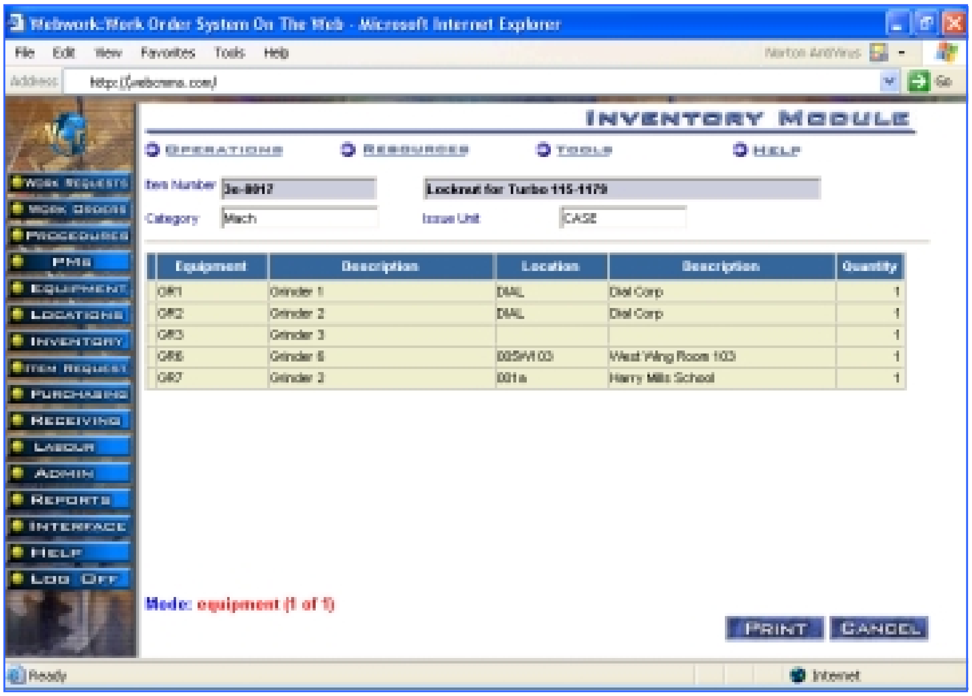
## 14.1 Where Used

To view a list of equipment and the accompanying location where an inventory item is used, use the Where Used menu option.

To view where an inventory item is used:

- Click on the INVENTORY button INVENTORY to access the Inventory module.
- Perform and inventory query to locate and open the inventory item of your choice.
- Click on the RESOURCES menu at the top of the Inventory Screen to display the drop down menu.
- Select Where Used from the drop down menu.

A screen similar to the one pictured below will open:




- The table shows the Equipment, Equipment Description, Location, Location Description and Quantity used for the item.
- Click on the PRINT button PRINT to print this information.
- Click on the RESOURCES menu and select Details from the drop down menu or click on the CANCEL button CANCEL to return to the main screen for the inventory record.

To change or add equipment where this inventory item is used you must do so in the Equipment Module by updating the Parts list for the applicable piece of Equipment.

## 15.1 Checking Requested Items

Use the Check Requested Items feature to view a list of item requests entered into the Web Work system.

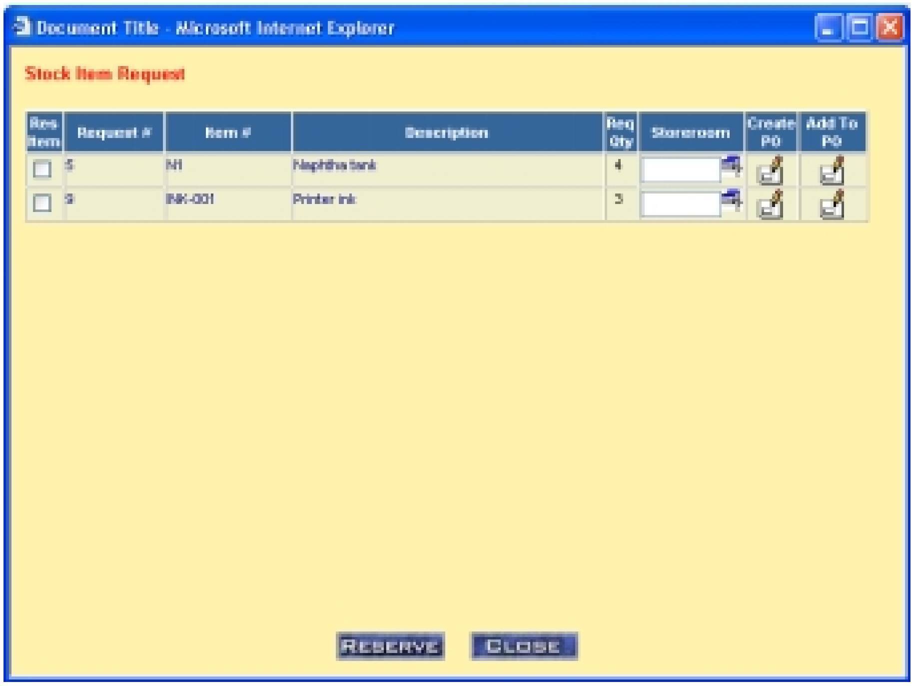
To check requested items:

- Click on the INVENTORY button INVENTORY to access the Inventory module.

- Click on the OPERATIONS menu at the top of the Inventory Screen to display the drop down menu.


- Select Check Requested Items from the drop down menu.

  The Requested Items screen as pictured below will open:




- If an item is in stock: click on the checkbox beside the applicable item requests.

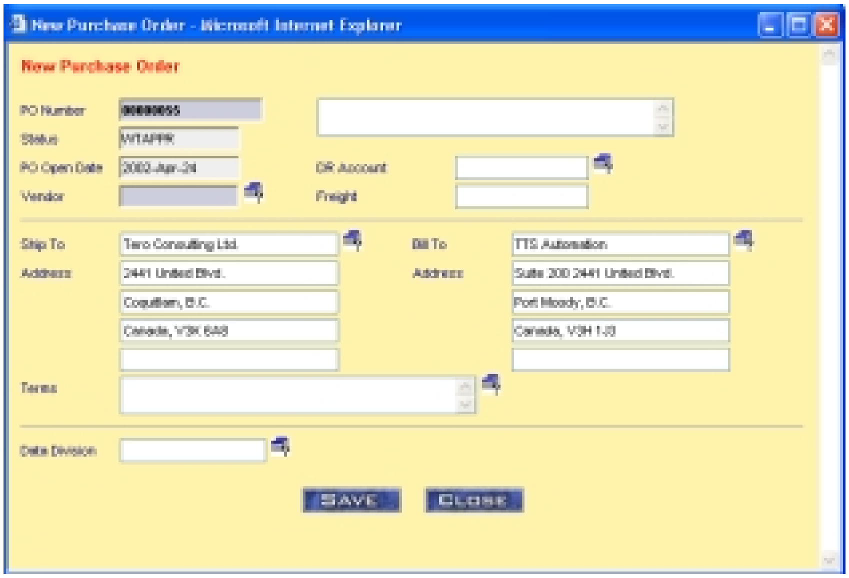
- Enter a storeroom into the storeroom field or click on the QUERY button to select a storeroom from the Web Work database.

- Click on the RESERVE button RESERVE to reserve the items selected.

  When an item is reserved it is added to a picklist and is ready for issuing. See Picklists and Issuing further on in this manual for more information on these features.

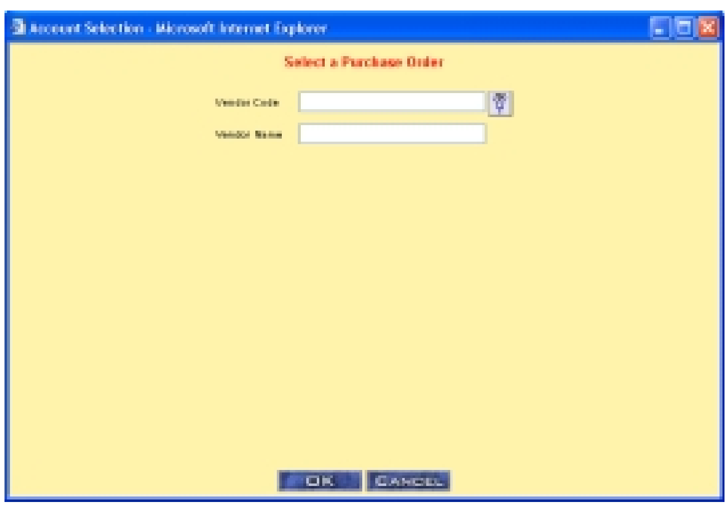
  If an item is not in stock, a new purchase order can be created to order the item or it can be added to an existing purchase order.

- Click on the UPDATE button in the Create PO column to create a purchase order for the request. The New Purchase Order window will open.




- Complete the details for the purchase order and click on the SAVE button  to save the purchase order. For more information on purchase orders see the Purchasing module chapter of this manual.

- Click on the UPDATE button  in the Add to PO column to add the request to a current purchase order. The Account Selection screen will open as pictured below:



- Select a vendor and then click on the FILTER button to view a list of open purchase orders for the selected vendor.

- Click on the RADIO button beside the applicable purchase order and then click on the OK button. This will open the New PO Line Item screen. Update information accordingly and then click on the SAVE button. For more information on purchase orders see the Purchasing module chapter of this manual.

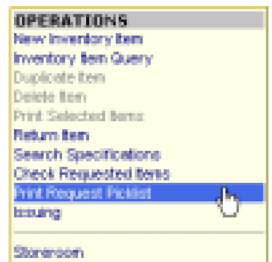
- Click on the CLOSE button to close the Requested Items screen.

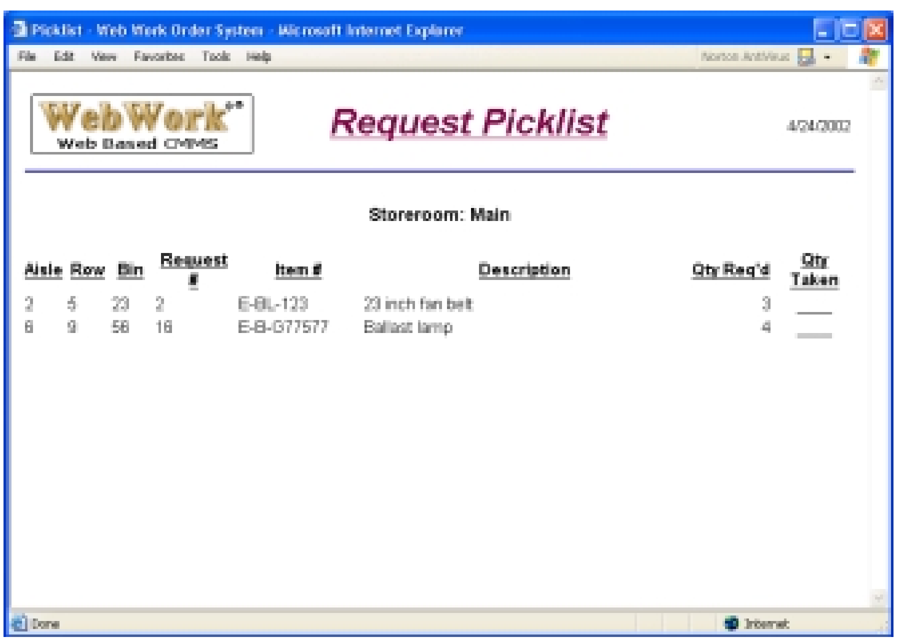
## 16.1 Printing Request Pick Lists

A request picklist is the list of items requests that were reserved using the View Requested Items feature.

To print request picklists:

- Click on the INVENTORY button to access the Inventory module.
- Click on the OPERATIONS menu at the top of the Inventory Screen to display the drop down menu.
- Select Check Requested Items from the drop down menu.
- The picklist will open in a new browser window as pictured below:



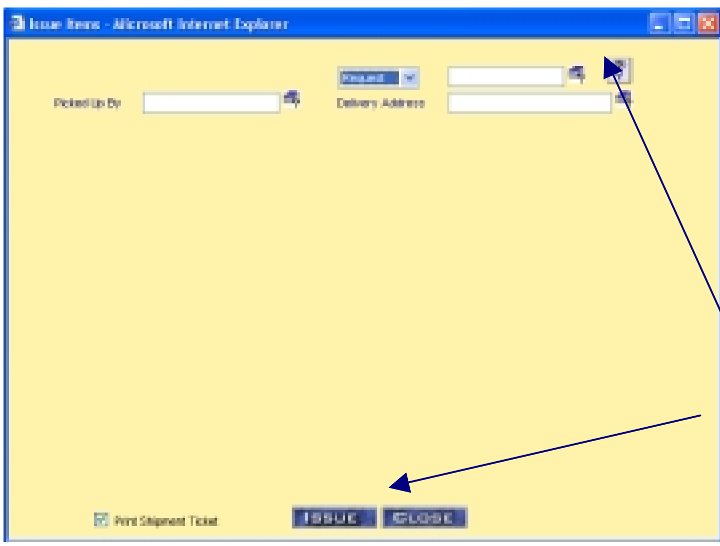

- Click on File and select Print from the drop down menu to print the picklist.

## 17.1 Issuing

The Web Work Issuing feature is used to issue materials reserved on a work order or item request.


- Click on the INVENTORY button INVENTORY to access the Inventory module.
- Click on the OPERATIONS menu at the top of the Inventory Screen to display the drop down menu.
- Select Issuing from the drop down menu.

  The Issuing screen as pictured below will open:




Click on the FILTER button to display a table containing the criteria you selected.

Click on the ISSUE button to issue the selected items or the CLOSE button to close the Issuing screen.

- Click on the down arrow to select Request or Work Order.
- Enter a Request or Work Order number or click on the QUERY button to select a request/work order from the Web Work database.
- Click on the FILTER button to display a table showing the results that match the criteria you selected.
- Enter the number of items you want to issue into the Qty to Issue field(s).

| Line # | Item # | Description | Status | Req Qty | Issued Qty | Stock | Qty To Issue |
|---|---|---|---|---|---|---|---|
| Storeroom Issue | | | | | | | |
| 1 | C-SB-5675 | Shelf bracket 4 by 6 | ISSUED | 4 | 2 | 6 | |

- Click on the ISSUE button to issue the selected items. If you issued only a portion of the requested amount, the Issued Qty field will be updated to display the number issued. If all requested items were issued the applicable row will no longer appear in the table.

- If the check box beside Print Shipment Ticket is checked, a shipment ticket will open in a new browser window. Click on File and select Print from the drop down menu to print the shipment ticket.

- When you are done issuing items, click on the CLOSE button to close the Issuing screen.

## 18.1 Printing Inventory Records

There are two ways to print Inventory Records. You can print an individual inventory record or multiple Inventory records that you have selected and retrieved.

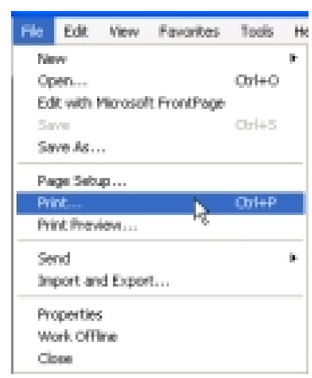
### 18.1.1. Printing Individual Inventory Records

To print only the inventory record that is open on the screen:

- Click on the PRINT button at the bottom right hand side of the screen.

- The selected record will open in a new browser window.

- Click on File and select Print from the drop down menu to proceed with printing.




### 18.1.2. Printing Multiple Inventory Records

To print a batch of inventory records:

- Perform an inventory query to open the desired inventory records. See Inventory Queries for more information on performing inventory queries.

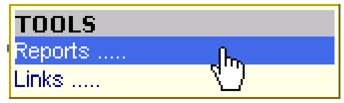
- Click on the OPERATIONS menu and choose Print Selected Items from the drop down menu.

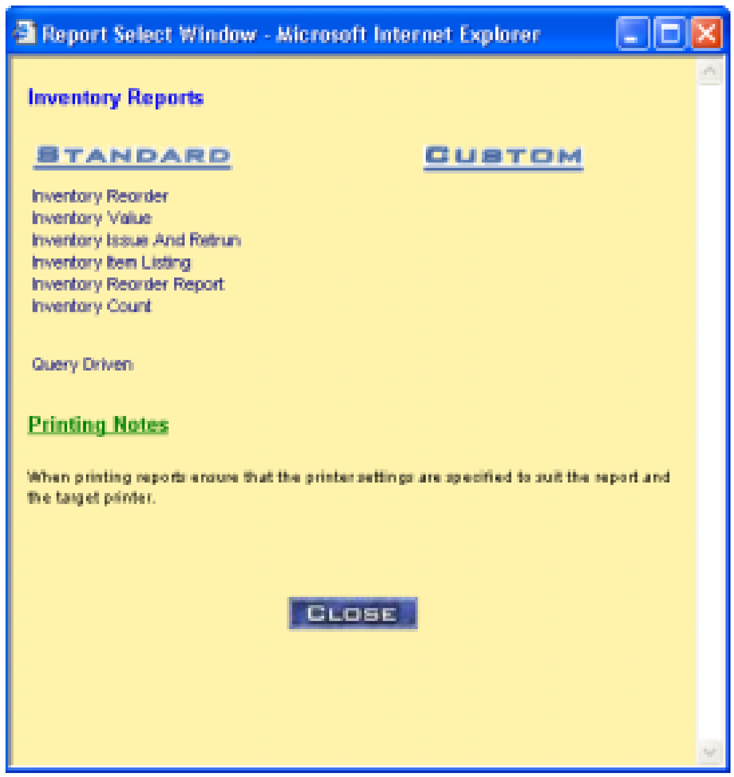
- The selected records will open in a new browser window.

- Click on File and select Print from the drop down menu to proceed with printing.

## 19.1 Inventory – Reports

To access Inventory reports click on the TOOLS menu and select Reports from the drop down menu.




Click on any of the Reports listed under Standard or Custom, to open them.

Only reports applicable to the Inventory module will be displayed. To view all reports, click on the REPORTS module button REPORTS on the left hand side of the Web Work screen. For more information about reports, see the Reports section of this manual.

### 19.1.1. Creating Inventory Reports

Reports cannot be created in the Inventory module. To create an inventory report click on the REPORTS module button REPORTS to access the report writer and create the report.

### 19.1.2. Printing Inventory Reports

Inventory reports can be printed from the Inventory module or from the Reports module.

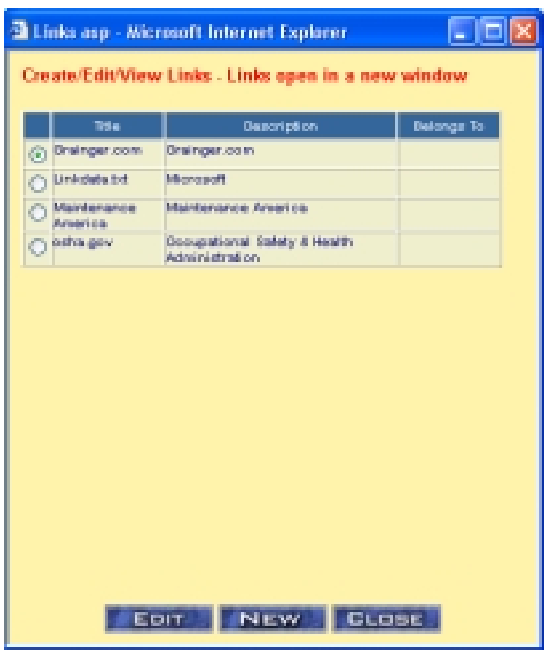
To print a report in the Inventory module:

- Open the Inventory module.
- Click on the TOOLS menu and select reports from the drop down menu.
- Select the report you wish to print by clicking on its title.

  The report will open in Preview mode.
- Click on File and select Print from the drop down menu to print the report.

## 20.1 Links

When you are in the Inventory module and you select Links from the TOOLS menu, the Web Work Create/Edit Links window will open as shown below. You can view existing links or create new links using this feature.




You can only view links, which have been setup to be accessible from this module or from all modules. Links set up in other modules with the accessibility set as only within that module will not be shown.